

INSTRUCTIONS FOR DIRECTORY Draft 4-30-15; UPDATED 2-27-19

SUMMARY OF TASKS EXPLAINED

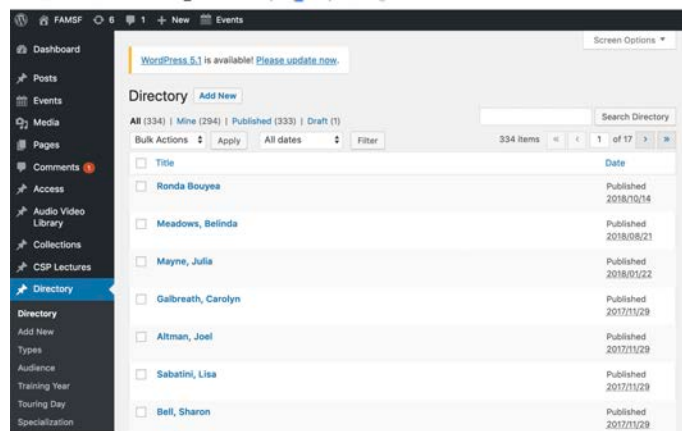
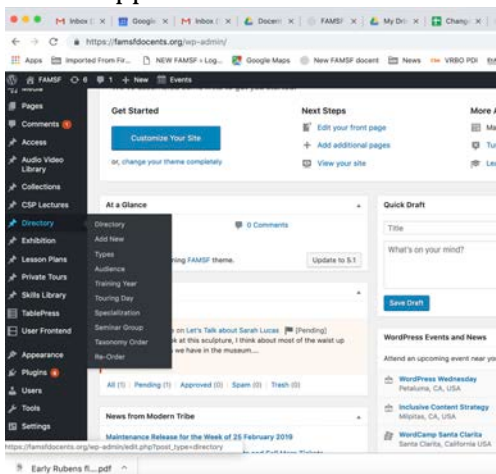
1. Update docent contact information. Add photos to contact.
2. Update docent touring status – active/supporting, day of the week, any specialty tours
3. Delete
4. Record all changes to the directory and Google master spreadsheet on a new Change History sheet in Google Drive. <https://docs.google.com/spreadsheets/d/10iqwxbNcsHOCLoZC-dEz2WL4eP54R-K8jBOvGceqAc/edit?usp=sharing>
5. The directory feeds many pages so if anyone needs any of these pages fixed, the Directory Editor is responsible.
 - a. <http://famsfdocents.org/docent-business/directories/> (5 different directories)
 - b. <http://famsfdocents.org/docent-business/leadership/>
 - c. <https://famsfdocents.org/docent-business/directories/trainee-directory/>
 - d. <https://famsfdocents.org/seminar-group/wed-pm/> (trainees by seminar group)

LOG INTO THE DIRECTORY

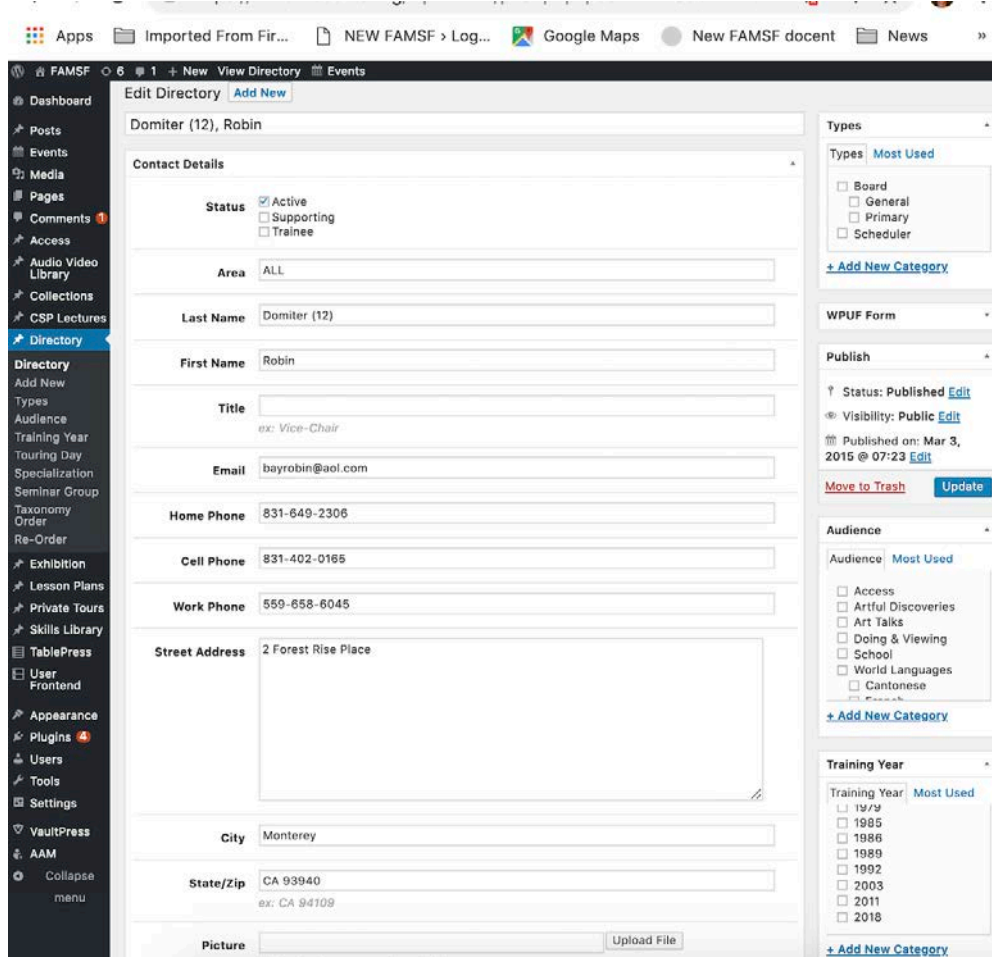
1. Famsfdocents.org
2. Username: yours
3. Password: yours
4. Once you log in, you will see a black editing ribbon, and in upper left FAMSF>Dashboard. Click to enter.

MAKE EDITS TO A CONTACT

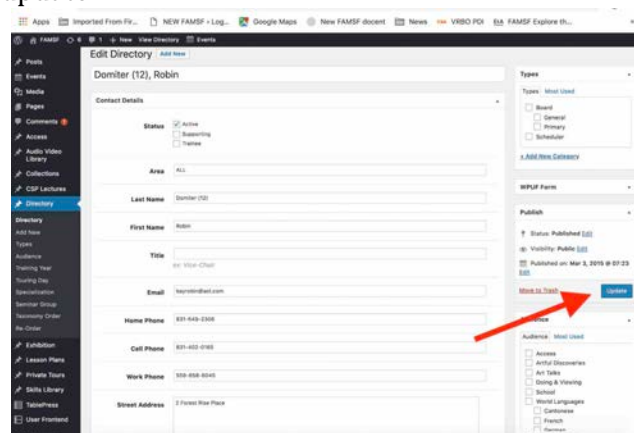
1. Find Directory in the left ribbon. Click to open up all the functions. Most of the time you will want to start by clicking on Directory > Directory which will open to a page of names and a search box in the upper left.



2. Use the search box to type in either first or last name, then hover with your cursor over the name to display editing functions. Click Edit to open the contact.
3. The large left window has contact information, including photo. It's also where you note LOA or Active 10 status, and identify status.



4. The narrower right column displays checkboxes for many ways we categorize docents. Make sure you scroll all the way down to see where you change Touring Day, Specialization, and Seminar Group.
5. To change Touring Day, uncheck the current selection and check the new touring day.
NOTE: you must always uncheck a current status (active vs. supporting vs trainee, touring day, seminar group) if you want to change the status. Otherwise the docent will appear in both touring days, or as both active and supporting, etc.
6. When you're done click update.

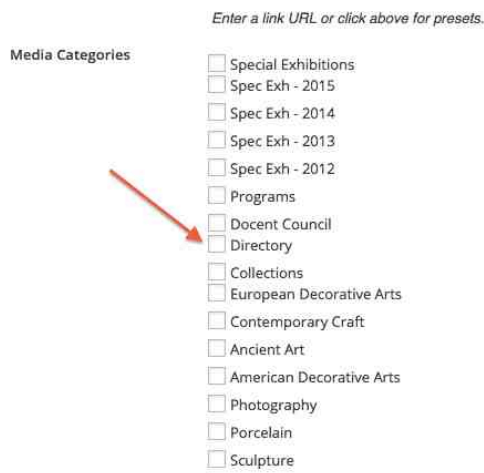


TO UPLOAD A PHOTO

1. Before you upload, make sure the name of the photo file is the docent's name. (this will be important for searching later)
2. Find Docent's name in directory and click Edit to open.
3. Scroll down the page until you get to Picture. Click upload
4. If you are uploading it from your desktop or iPad, select From Computer, then select files.
 - a. Find the image and select Open.
 - b. In the window, the file status bar on the bottom right will show upload % then "Crunching."
 - c. When the file has completed uploading, it will show at the bottom.
5. Title field: Add docent first name and last name



6. When the image has uploaded, scroll down this same pop up window, until you see the list of Media Categories. Check off Directory.

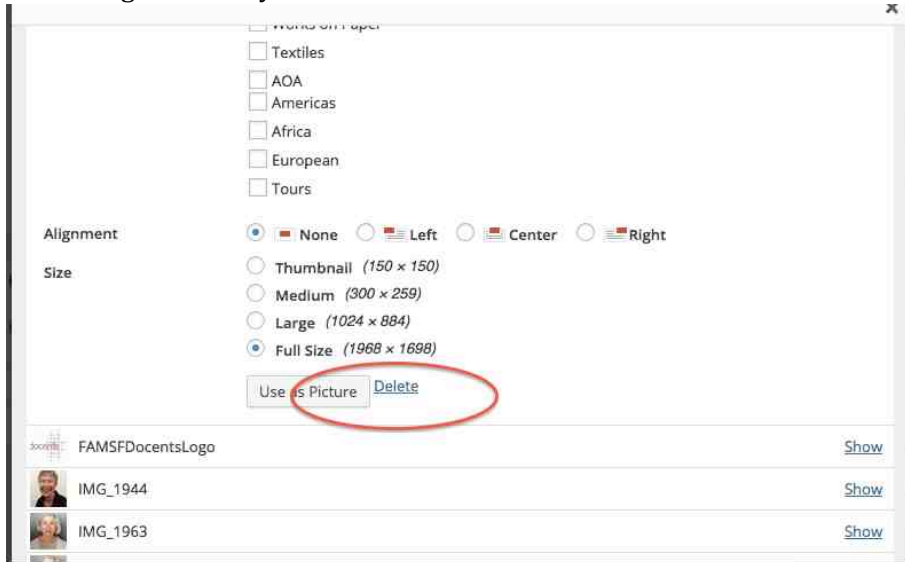


7. Scroll down further, and check off
 - a. Full Size
 - b. Use as Picture
 - c. Save all changes
8. You should next see the Directory entry for this docent, and his/her photo in place.

9. Scroll back up to find the blue UPDATE button to save your changes.

TO DELETE DUPLICATE IMAGES FROM THE MEDIA LIBRARY

1. In the Directory, go to any existing entry, scroll down to the Picture area, and click on Upload File. You will see the pop up box for adding files.
2. Click on Media Library.
3. Find the images that you want to delete. Click Show, on the right of the entry. Scroll down to the right, where you will see a delete link.



4. It may be difficult to know which you have already put into the docent's directory. So, it's trial and error.
 - a. In order to check your work as you go, to see if you have deleted the right image, open a second browser window on your computer. Bring up the site and the Active Directory page.
 - b. Toggle back and forth between the 2 windows – make an edit in one window, then update, then refresh the other window with the end user view to see if the change was made.
5. To avoid deadly file names like IMG_392, BEFORE you upload, give the image a name. This way, in the Media Library it will always have the right file name.